



Blue Prism® TAP Partner & Digital Exchange

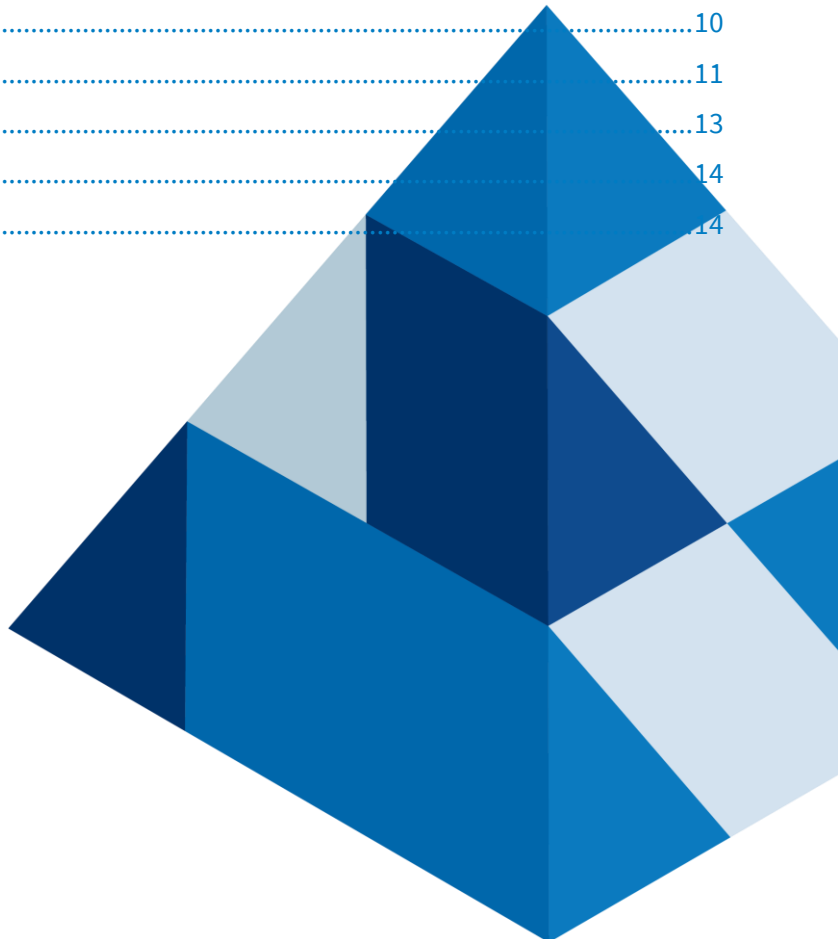
User Guide

Document Revision 3.6



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Overview

The Blue Prism Digital Exchange (DX) makes the democratizing of AI a reality for all enterprises and further establishes Blue Prism as the de facto Digital Workforce Platform. The Digital Exchange makes the consumption of AI technology fast and simple and helps businesses connect and integrate their systems of record with disruptive technologies for greater operational agility. The Digital Exchange is a “shop window” to bring new and emerging technologies to life and allow our partners to give global enterprise customers direct access to technologies from Blue Prism and our partners as downloadable apps or via referrals to the partner for sale, a la iTunes App store. It is an extensive and professional marketplace that will enable thousands of users and over 1000 customers worldwide to see the “art of the possible” that is only achievable through a turn-key, ecosystem of best-of-breed technologies.

About this Document

This document has been compiled to provide an overview of the Digital Exchange and how to utilize the various functions within the tool. The Digital Exchange is a best of breed technical platform allowing for Partners to provide a storefront to their complementary products/solutions. Customer can review the options and learn more about the possibilities between Blue Prism and our trusted partners and providers. All assets on the exchange will be technically reviewed to ensure that they do not contain any malware and generally function as expected.

Blue Prism Digital Exchange Team

Title	Name
Paul Nerger	VP Digital Exchange
Rich Pauly	Global Head of Digital Exchange
Kyle Strumberger	Global Manager Digital Exchange
Melanie Giuliani	Online Community Manager
Ruth Francis	Digital Exchange Support Engineer

TAP Registration Overview

Please follow the below steps in order to complete your registration process on the Blue Prism Digital Exchange. They must be followed sequentially, if not the TAP application will not be available to view after saved / submitted. All fields are hyperlinked to bring you to the exact webpage to complete the associated process.

1. [Register on the DX](#)

Follow the registration process on the Blue Prism portal to complete this step.

Current Blue Prism Portal Users

If you have an existing account with Blue Prism on the [Blue Prism Portal](#), you will be able to use your same credentials to log in to the Digital Exchange.

New Blue Prism Portal Users

If you have never visited on the Blue Prism Portal, you will have to [register](#).

2. Create Company on DX

Once you are a registered user on the Digital Exchange you will need to either register or associate your company. If your domain matches an existing domain in the system, you will be prompted to select that company and the association will be made automatically. If the system is unable to find an association, then you will be prompted to add your company information.

3. [Sign Up as a Provider](#)

In order to contribute to the Digital Exchange by posting assets you will need to [register](#) as a provider. When registering please fill out the DX Partner Profile in its entirety and our internal team will review and approve shortly after submission. Assets do not need to be uploaded at this time, it can be completed later.

4. [Sign Up as a TAP Provider](#)

You will need to [register](#) as a Technology Alliance Partner to complete the necessary onboarding to be considered a TAP Premier or TAP Affiliate Partner. Please complete this registration form in its entirety to be considered for TAP partnership. An internal Blue Prism employee will review and approve/deny. If approved your assets and profile on the DX will receive TAP badging.

5. [Submit Asset](#)

Once you have completed your registration, signed up as a Partner/Provider, and completed your DX Profile you will have the option to [Submit an Asset](#). Asset submission is the core of the Digital Exchange. It allows the partners the capability to showcase their Blue Prism complementary solutions.

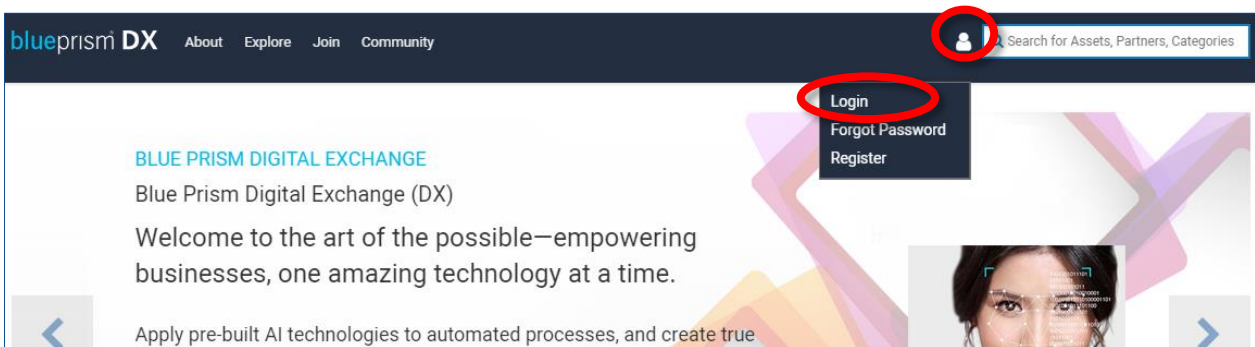
Registration/Login Process

Navigate to <https://digitalexchange.blueprism.com>

Current Blue Prism Portal Users

If you have an existing account with Blue Prism on the Blue Prism Portal, you will be able to use your same credentials to log in to the Digital Exchange.

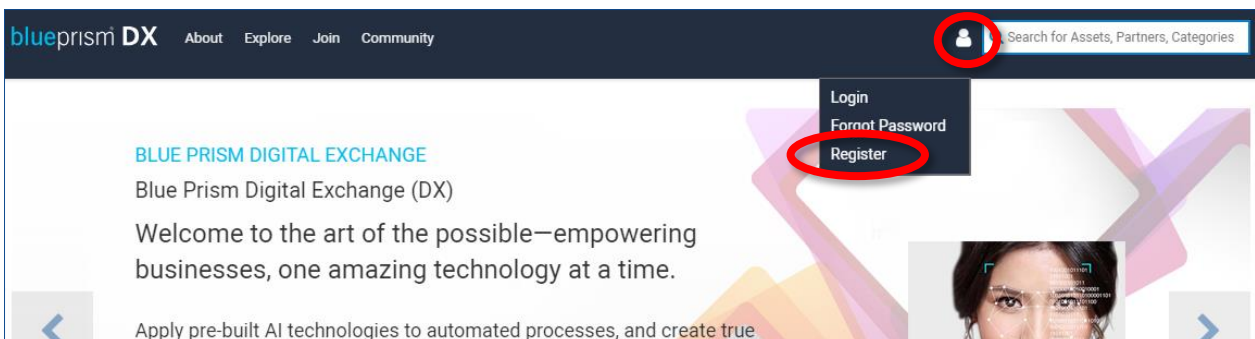
1. Visit <https://digitalexchange.blueprism.com>
2. Click the person icon on the top right corner of the page
3. Select the ‘Login’ option
4. Once redirected to the Blue Prism Portal login screen, enter your credentials
5. Upon acceptance of your credentials you will be directed back to the DX



New Blue Prism Portal Users

If you have never visited on the Blue Prism Portal, you will have to register.

1. Visit <https://digitalexchange.blueprism.com>
2. Click the person icon on the top right corner of the page
3. Select the ‘Register’ option
4. Once redirected to the Blue Prism Portal login screen, at the bottom of the page select ‘Sign Up Here’
5. Follow the prompts and enter your information
6. Once submitted you will receive a welcome email to complete your registration and password



Company Registration Process

Once you are a registered user on the Digital Exchange you will need to either register or associate your company. If your domain matches an existing domain in the system, you will be prompted to select that company and the association will be made automatically. If the system is unable to find an association, then you will be prompted to add your company information. **This is all you need to do from a registration process if you are interested in just using the DX. If you would also like to post assets to the DX, then you must [register as a Provider as well](#).**

New Company

If you are not associated with a company or the first user for your company to register on the Blue Prism Digital Exchange, you will have to create your company and will be redirected to the company registration page. Please fill out all the required information regarding your company and select create.

Enter your company name below to begin the process of registering your company or to associate your account to an existing company within our system.
* denotes required fields

Company Information

Company Name *

Corporate HQ Address *

Corporate HQ Address 2

City *

Province

Postal Code *

Country *

Company Phone *

Company URL *

Company Description

[CREATE](#) [START OVER](#)

Existing Company

If the Digital Exchange recognizes your domain as one tied to an existing Digital Exchange Company, it will show you the company option. If it is your company, then click on select on the right side to be correctly associated:

Company Registration (Matches Found)

Possible existing company matches have been found. Select a company name from the list to associate yourself to the company or click Create New Company to register as a new company.

[CREATE NEW COMPANY](#)

Company Name	Address	Action
Blue Prism http://www.blueprism.com	338 Euston Road London, United Kingdom NW1 3BG	Select

Join the DX as a Technology Alliance Partner (TAP) and Provider

If you would like to continue and join the Digital Exchange in order to share assets, then you will want to register as a partner/provider.

1. Login using your Blue Prism Portal credentials
2. Select 'Join' on the top navigation bar
3. Select your provider type: TAP Partner, Provider, or Other Types of Partnership
 - **Technology Alliance Partner** – You are an independent software vendor (ISV) and would like to create integrations with Blue Prism. You must [sign up as a Provider prior to completing the TAP Application](#).
 - **Provider** – You have developed assets that you would like to upload to the Blue Prism Digital Exchange. A Provider is someone who might or might not be a Partner of Blue Prism but would like to contribute an asset to the Digital Exchange.
 - **Other Types of Partnership** – For any other type of partnership (to become a Channel Partner, Value Added Reseller, Authorized training partner etc.), please visit this link and complete the questionnaire.
4. If you would like to be a TAP Partner, or you fall into the Other Types of Partnership category, you will be redirected to a request form to fill out for review and approval in a timely manner.
5. If you choose Provider, you will be directed to enter in your Digital Exchange Profile details.

blueprism DX About Explore **Join** Community

Join the DX

Thank you for your interest in becoming a Blue Prism partner! Our partnership programs are crafted to meet the needs of our partners based on how they do business. We want to make sure that achieved success in Blue Prism's ecosystem is expedient and fruitful. Please review the options below and select the one that fits your partnership goal with Blue Prism.

TECHNOLOGY ALLIANCE

You are an independent software vendor (ISV) and would like to create integrations with Blue Prism

[Sign Up](#)

PROVIDER

You have developed assets that you would like to upload to the Blue Prism Digital Exchange.

[Sign Up](#)

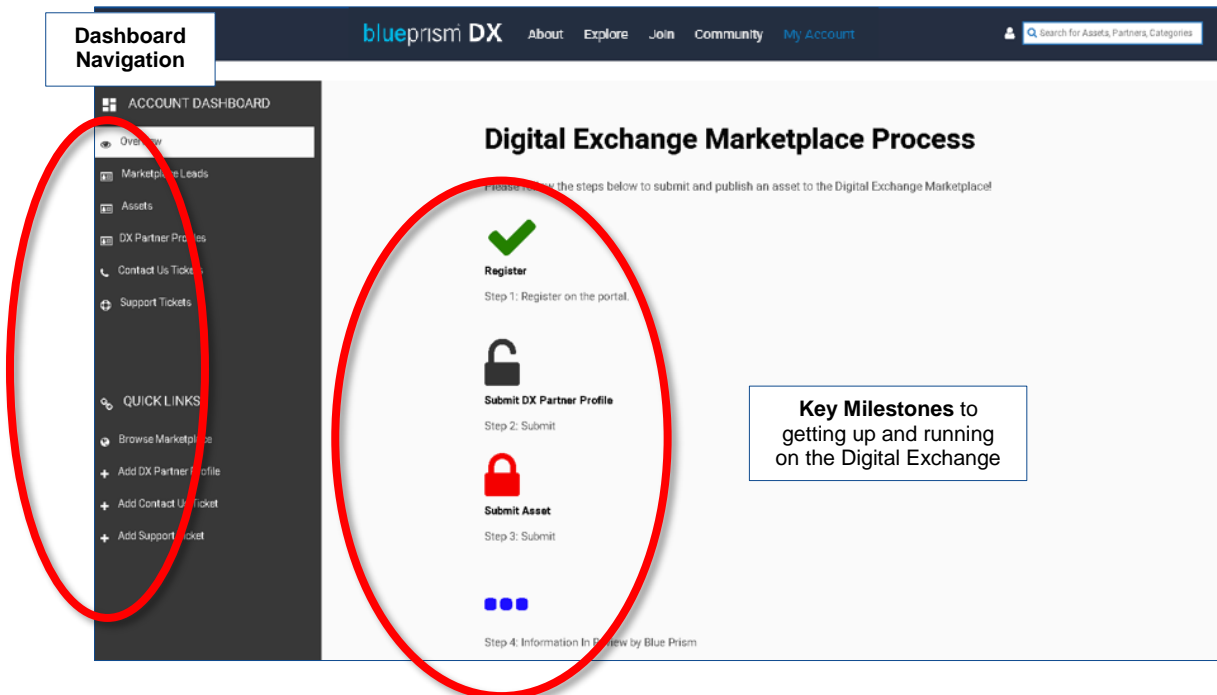
OTHER TYPES OF PARTNERSHIP

For any other type of partnership (to become a Managed Service Provider, Value Added Reseller, Authorized training partner etc.), please visit this link and complete the questionnaire.

[Sign Up](#)

The Digital Exchange Dashboard

Once you have registered as a Partner/Provider on the Digital Exchange you will have an option labelled ‘My Account’ where you can manage your profile, submitted assets and your TAP Application. Main navigation will help you to manage your profiles, submissions, and leads. The key milestone area is critical in the beginning for the first set of steps to get up and running quickly on the Digital Exchange.



Dashboard Navigation

- **Overview** – The page that you have landed on and viewing when you first login
- **DX Leads** – Customer leads from your asset or solution will appear here
- **Asset** – Listing of the assets or solutions that you have created for the Digital Exchange
- **DX Partner Profile** – Lists out your profile on the Digital Exchange
- **TAP Application** (if applicable) -
- **Contact Us Tickets** – These are generic, non-specific tickets or questions about Blue Prism, the Digital Exchange, or the Blue Prism Product
- **Support Tickets** – These are specific tickets about your profile/assets on the Digital Exchange. Items here might be asset publishing related, questions about your profile, etc.
- **Quick Links** – Links to basic tasks for ease of use

Key Milestones

On the right side of the Dashboard page is the “Digital Exchange Process”. This is the process that will walk you through your individual setup from start to finish. There are a few different icons you will notice as you walk through the process:

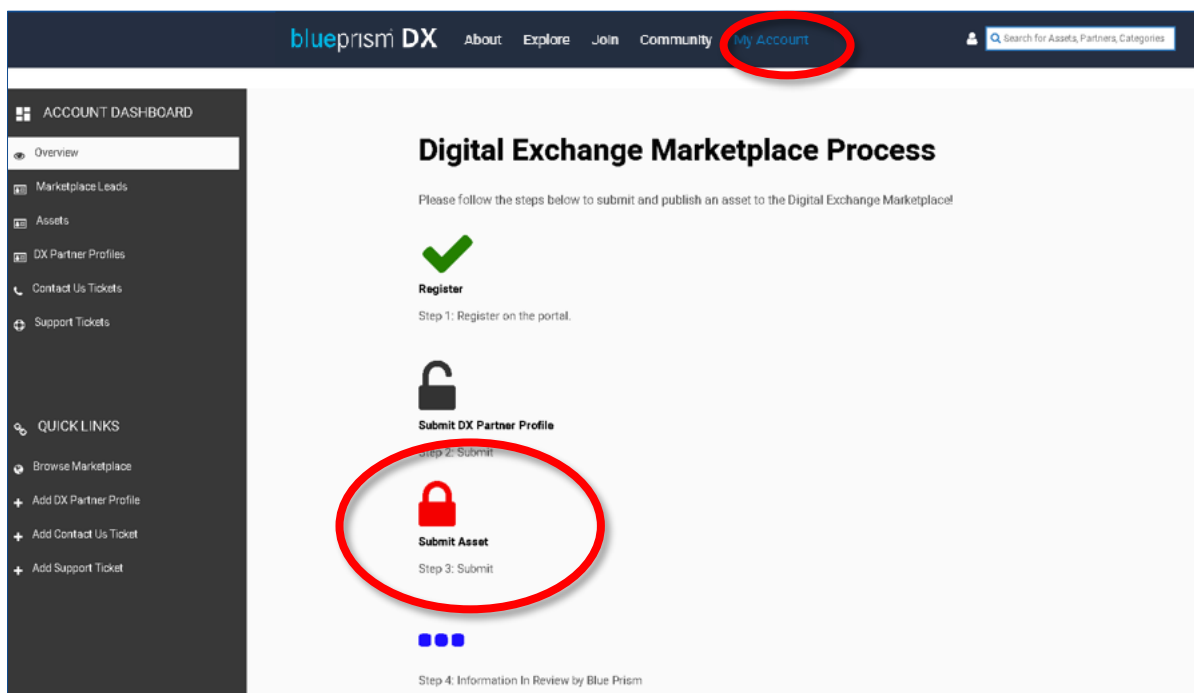
- **Green Check Mark** – a task you have already completed
- **Black Lock** – the next task to complete, the lock is also an active link
- **Red Lock** – Tasks further down the process that are not yet available to you
- **Blue Dots (3)** – These are additional tasks that will show as needed depending on your role

Submit DX Partner Profile

Once registered as a Partner/Provider you will have access to 'My Account'. Under the Overview portion of the Dashboard you will see you have unlocked the ability to submit a DX Partner Profile. Creating your DX Partner Profile is a necessary step that must be taken in order to submit an asset.

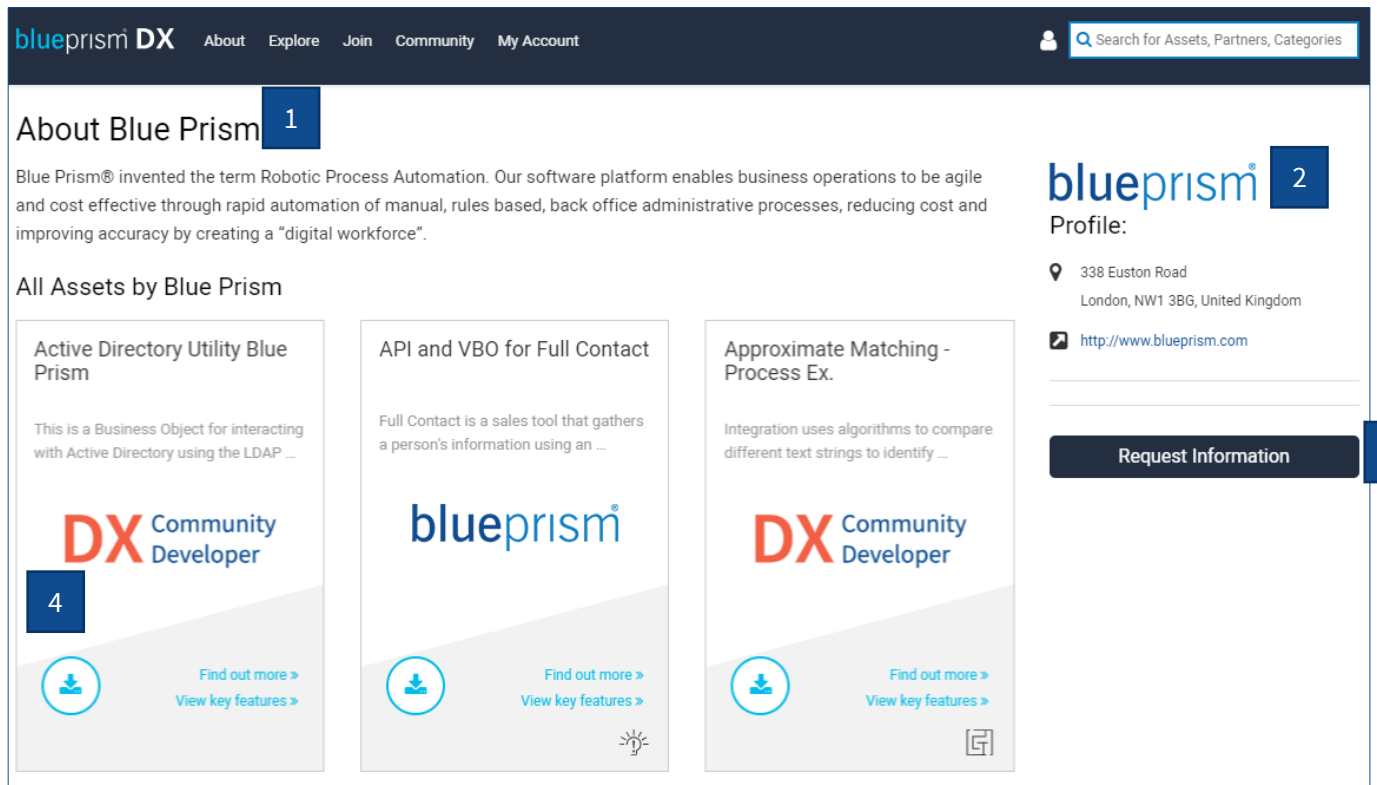
Submission Process

1. Ensure you have registered your account and joined the Digital Exchange as a Partner/Provider
1. Login using your Blue Prism Portal credentials
2. Visit 'My Account' on the top banner
3. Select 'Account Dashboard'
4. Select 'Submit DX Partner Profile' from the Digital Exchange Process page
5. Complete DX Partner Profile template with your company information, logo, and category information
6. Your DX Profile will be submitted to the Blue Prism Marketplace Manager for approval



DX Profile Layout

Your DX profile is the presentation of your company on the Digital Exchange. It is open to the public and includes the following elements:



The screenshot shows the Blue Prism DX profile layout. At the top is a navigation bar with 'blueprism DX' and links for 'About', 'Explore', 'Join', 'Community', and 'My Account'. A search bar is on the right. The main content area is divided into several sections:

- 1**: 'About Blue Prism' section containing a description of the company and its software platform.
- 2**: 'Profile' section containing the company logo, address (338 Euston Road, London, NW1 3BG, United Kingdom), and website link (http://www.blueprism.com). A 'Request Information' button is located below this section.
- 3**: A dark button labeled 'Request Information'.
- 4**: 'All Assets by Blue Prism' section displaying three asset cards: 'Active Directory Utility Blue Prism', 'API and VBO for Full Contact', and 'Approximate Matching - Process Ex.'. Each card includes a description, the Blue Prism logo, and a 'DX Community Developer' badge. At the bottom of each card is a download icon and a 'Find out more >' / 'View key features >' link.

1. This is the description of your company to the world. It's about what you do and the value you can bring. Be sure to convey your message in a direct, concise way.
2. Here is the location of your logo as well as the company address and link to your website
3. Request Information allow for customers to contact you directly. On the Profile form, this is the Lead Contact email field.
4. All assets you post will show up at the bottom of the page. There is no action required in this area as the system will automatically pull in your asset submissions.

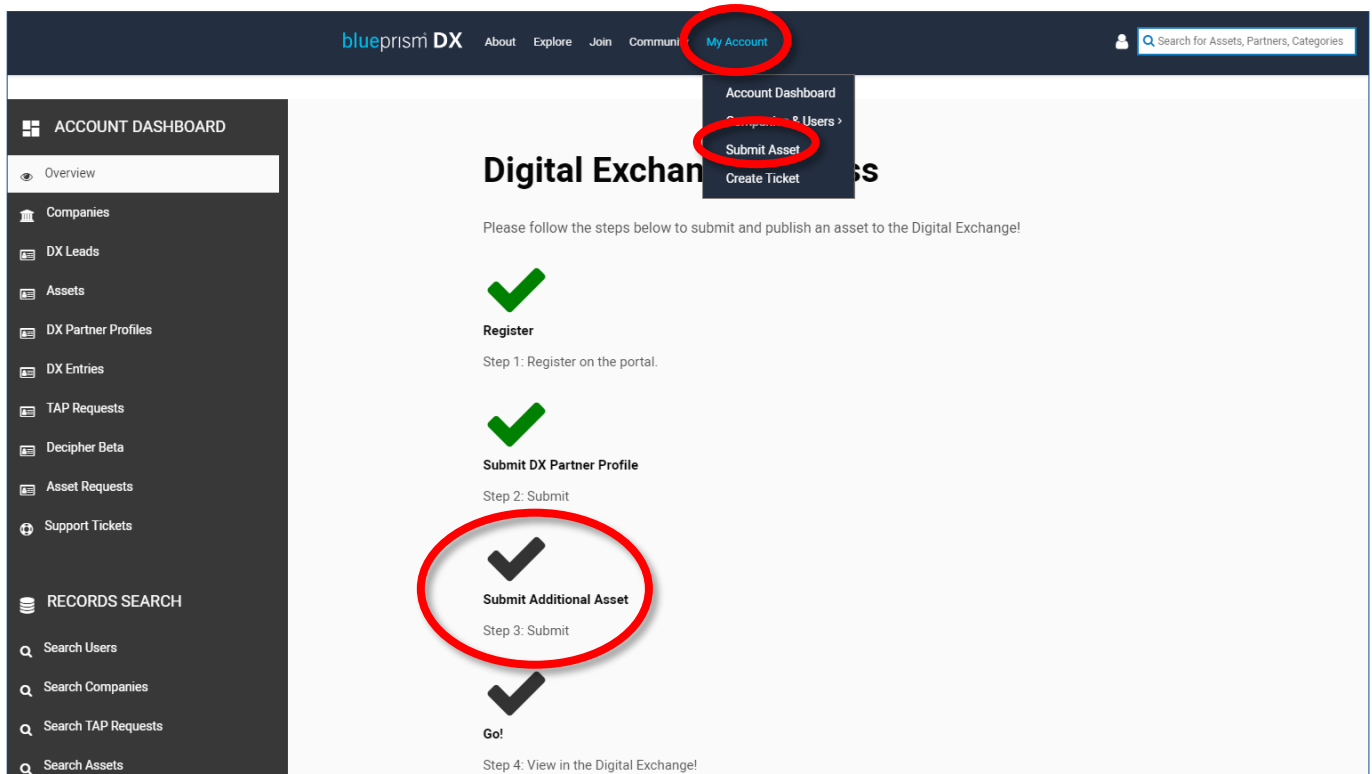
Note: This will be filled out before you submit any assets, and will be subject to the DX Manager approval. At any time in the future if you need to update, you will be able to access it through the dashboard. All elements of your company will be carried over from the company submission during registration. The only fields that you will have to add for the profile are: Long and short company descriptions, Logo, Lead Contact Email, and Applicable Skills, Technologies and Industries.

Submitting an Asset

Once you have completed your registration, signed up as a Provider, and completed your DX Profile you will have the option to Submit an Asset. Asset submission is the core of the Digital Exchange. It allows the partners the capability to showcase their Blue Prism complementary solutions.

Submission Process

1. Ensure you have registered your account, joined the Digital Exchange as a Partner/Provider, and created your DX Partner Profile
2. Login using your Blue Prism Portal credentials
3. Visit 'My Account' on the top banner **OR** 'Submit Asset' to be taken directly to the Submit Asset form
4. Select 'Account Dashboard'
5. Select 'Submit Asset' from the Digital Exchange Process page
6. Complete the Submit Asset form with as much information as possible
7. Once relevant details have been added, select 'Save for Later' to continue working on your submission or 'Create Asset' at the bottom of the form to initiate the approval workflow
8. Your Asset Submission status will be set to 'Pending Approval' and go through the approval workflow and be reviewed by the Blue Prism Marketplace Manager, Blue Prism Marketing, as well as the Blue Prism Technical team to ensure the validity and completion of your submission
9. Once approved your asset will be published on the Blue Prism Digital Exchange



The screenshot displays the Blue Prism Digital Exchange (DX) user interface. At the top, the navigation bar includes 'blueprism DX', 'About', 'Explore', 'Join', 'Communi', and 'My Account' (circled in red). A search bar on the right contains the text 'Search for Assets, Partners, Categories'. Below the navigation bar, a dark sidebar on the left lists various menu items under 'ACCOUNT DASHBOARD', 'COMPANIES', 'RECORDS SEARCH', and 'SUPPORT TICKETS'. The main content area features a 'Digital Exchange' header and a list of steps to submit an asset:

- Register**
Step 1: Register on the portal.
- Submit DX Partner Profile**
Step 2: Submit
- Submit Additional Asset** (circled in red)
Step 3: Submit
- Go!**
Step 4: View in the Digital Exchange!

The 'Submit Asset' option in the top navigation menu is also circled in red.

Asset Submission Layout

The screenshot shows an asset submission page for 'TimelinePI Process Intelligence'. The layout includes:

- 1. Asset Name:** 'TimelinePI Process Intelligence' with a 'TAP' tag.
- 2. Asset Pitch:** A short paragraph describing the asset's value.
- 3. Partner Offering:** A paragraph describing the provider's technology.
- 4. Images:** A row of five image thumbnails.
- 5. Videos:** A row of three YouTube video thumbnails.
- 6. About:** A section with a summary of the asset's value.
- 7. Benefits:** A list of key benefits.
- 8. All Assets by Company:** A link to view all assets from the provider.
- 9. Download Link:** A button to download the asset or redirect to the provider's page.
- 10. Request Information:** A button for further inquiries.
- 11. General Information:** Fields for Version, Updated, Author, and Type.
- 12. Documentation:** A list of documents and links.
- 13. Support:** A section for support contact information.
- 14. Categories:** A list of applicable industry categories.

1. **Asset Name** – Title of your asset
2. **Asset Pitch** – Appears on the nameplate, >125 characters
3. **Partner Offering** – Description of Partner/Provider’s proprietary technology
4. **Images** – Up to 5 images can be hosted in this section
5. **Videos** – Up to 3 Youtube videos can be hosted in this section
6. **About the Asset** – Summary of the value of the asset
7. **Benefits of the Asset** – Features and benefits of the asset
8. **View All Assets by Company** – Review all assets submitted by a specific company
9. **Download Asset** – Initiate download of asset or redirect to Partner/Provider landing page
10. **Request Information** – Customers submit leads for further inquiries
11. **General Information** – Version, author, asset type, last updated date
12. **Documentation** – Integration guides, marketing materials, etc.
13. **Support** – Support contact
14. **Categories** – Industry categories applicable to the asset

Types of Assets

Please be aware that when selecting the type of asset you would like to publish you can only submit one of the following. If you provide both the system will not publish out your submission as it will not know which option to choose. Please make sure to only load an asset or link out to your chosen site.

Download Directly from the Digital Exchange

You have the ability to host your asset directly on the Digital Exchange. This will allow all registered users to download your asset through their web browser. Your submitted asset can be a **Visual Business Object (VBO)**, **Command Line**, **SOAP Web Service**, a **Solution**, or a **Skill**. If you would like users to have the ability to download your asset directly from the Digital Exchange, you will need to complete the following in the Submission Form:

- **Technical Asset Upload** – Use the first file if your asset is not going to be posted as a Blue Prism skill (skills were introduced in Blue Prism version 6.4). If you would like to add your asset as a skill, see below.
- **Agree to MIT or GNU License** – these are publish sharing licenses and one choice is required for your asset
- **Complete the Market Intake Form** – This is requirement of the US Government for digital assets

Technical Asset Upload

If you are providing a link to a landing page outside of the Digital Exchange, then please skip this section and move to "Asset Details" below.

The Asset Submission Review Guide can be found [here](#)

Technical Asset Upload

UPLOAD A FILE

Skill Upload

Technical Asset Upload for Asset that you want converted to a Blue Prism Skill (6.4 compatibility). You will need to upload 3 files for the conversion - WebAPI, JSON, and Image for the Skill.

WebAPI

UPLOAD A FILE

JSON

UPLOAD A FILE

Image

UPLOAD A FILE

Licensing Selection

Uploading an Asset to the Blue Prism Digital Exchange requires agreement to either the MIT or GNU License; please select one.

I agree to MIT License at <https://opensource.org/licenses/MIT>

I agree to GNU General Public License (GPL) version 2 at <https://opensource.org/licenses/gpl-license>

Please attach source code here

UPLOAD A FILE

If you decide to license an Asset under the GNU General Public License, you must upload the complete source code for the Asset so that we can offer it to the Community when we make the Asset available. If you do not want to disclose the complete source code, then you must not choose the GNU General Public License.

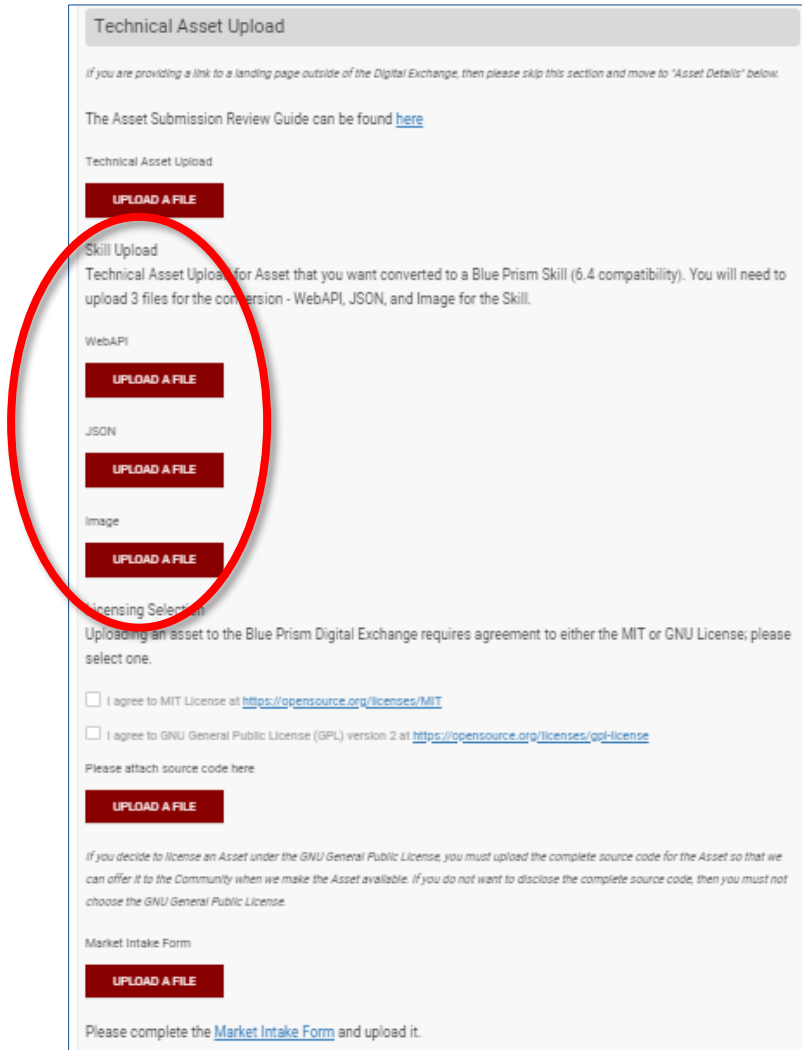
Market Intake Form

UPLOAD A FILE

Please complete the [Market Intake Form](#) and upload it.

Skill Submission

If you have created a WebAPI compatible with Blue Prism 6.4 and would like it converted to a skill you will need to provide the following **in addition to the license and market intake form** discussed in the above section.



Technical Asset Upload

If you are providing a link to a landing page outside of the Digital Exchange, then please skip this section and move to "Asset Details" below.

The Asset Submission Review Guide can be found [here](#)

Technical Asset Upload

UPLOAD A FILE

Skill Upload

Technical Asset Upload for Asset that you want converted to a Blue Prism Skill (6.4 compatibility). You will need to upload 3 files for the conversion - WebAPI, JSON, and Image for the Skill.

WebAPI

UPLOAD A FILE

JSON

UPLOAD A FILE

Image

UPLOAD A FILE

Licensing Selection

Uploading an Asset to the Blue Prism Digital Exchange requires agreement to either the MIT or GNU License; please select one.

I agree to MIT License at <https://opensource.org/licenses/MIT>

I agree to GNU General Public License (GPL) version 2 at <https://opensource.org/licenses/gpl-license>

Please attach source code here

UPLOAD A FILE

If you decide to license an Asset under the GNU General Public License, you must upload the complete source code for the Asset so that we can offer it to the Community when we make the Asset available. If you do not want to disclose the complete source code, then you must not choose the GNU General Public License.

Market Intake Form

UPLOAD A FILE

Please complete the [Market Intake Form](#) and upload it.

- **WebAPI** – The code that will perform the action or interface the Digital Worker and the complementary technology. This will be in the format of a .bprelease file.
- **Image** – Must provide an image that will be placed in the skills toolbar on the right. It will need to be 50x50 pixels and reference the name of the asset in a clear and concise way so not to confuse the consumer.
- **JSON File** – Organized according to the following format:

```
{
  "ProductId": "00000000-0000-0000-0000-000000000000",
  "SelectedWebApi": "532d6da4-2c6b-48d0-9b98-f77f31a7d9e3",
  "CategoryId": 1,
  "VersionNumber": "1",
  "Name": "Test",
  "Description": "Test",
  "IconFilePath": "icon.png",
  "BluePrismVersionCreated": "6.4",
  "BluePrismVersionTested": "6.4",
  "Provider": "Test"
}
```

Link Out to Download

By linking out to your asset this will redirect users to leave the Digital Exchange and visit the predetermined web address you have provided in your Asset Submission. This option is for Partners/Providers who would like to provide more guidance, assist in integration of the asset, review potential opportunities with customers, sell their integration, etc. We ask that if you choose this option the landing page you direct customers to a page that will direct them through the next steps of their download/integration.

Asset Details

Asset version/release number *

Please fill out this field.

Supported Versions *

Landing Page Link

If hosting the asset on your own website, please provide a link to where you will engage inbound requests to learn more how to purchase your solution. Do not enter anything here is you have uploaded an asset in the previous section.

Support URL *

Private Assets

Private Assets allow customers to post assets to the Blue Prism Digital Exchange that are only visible and shareable with team members from the same company. Customers will create their own private DX assets co-branded for their enterprise. Each asset that is loaded onto the Digital Exchange will have the option to be marked as Private.

Company members will need to be logged into the DX to view and action the private assets. DX Users not associated with the company that created the private asset will not be able to view the private asset(s). All assets marked as private will have a lock int the upper right corner of the asset card that denotes the asset as private. Any card not displaying this lock is visible to the general public.

Active Directory Utility Blue Prism
🔒

This is a Business Object for interacting with Active Directory using the LDAP based API in .NET

Blue Prism Active Directory System

Download Asset

Request Information

General Version: 1.0 Updated: Apr 10, 2019 Author: Blue Prism Type: Visual Business Object (VBO)	Documents <ul style="list-style-type: none"> Blue Prism Active Directory VBO • Installation Guide Documentation, descriptions and screenshots are licensed under the Creative Commons Attribution-ShareAlike (CC-BY-SA) 3.0 license
Support Community Supported	Licenses This asset is licensed under the MIT License
Categories	

Active Directory Utility Blue Prism
🔒

This is a Business Object for interacting with Active Directory using the LDAP ...

↓

Find out more >>

View key features >>

Sign Up for Ability to Post Private Assets

Please send an email to DXSupport@BluePrism.com to sign up for access to private assets for your company. When submitting this request, please include the following:

- **Subject Line:** Setup Private Assets
- **Body:** Email and Phone of primary contact managing private assets

Submitting Private Asset

1. Login to the Digital Exchange with your Blue Prism Portal Credentials
2. Submit an asset following the “[Submission Process](#)” section of this document.
3. Select the checkbox titled “Is this Asset Private?” on the Asset Submission Form

Submit Asset

* denotes required fields

Asset Information

Asset Name / Title *

Private Asset Example

What you call the integration to customers.

Is this Asset Private?

Approval Process

Once your asset is submitted it will go through an approval workflow for review by the Blue Prism Technical Team, Marketing Team, and Digital Exchange Marketplace Manager.

- **Technical Team** – Review to ensure the asset/solution contains documentation for setup/configuration, dependencies, troubleshooting etc. Confirms the asset is secure and does not contain any harmful virus or suspicious code and contains portability to mirror what is being described in the setup documentation.
- **Marketing Team** – Review to ensure the positioning and wording around the asset is user friendly, clear and concise, and sends the appropriate message.
- **Marketplace Manager** – Final review to ensure all necessary documentation is present.

If the Blue Prism team finds that all details for the asset and marketing material are in order, then the team will change the status to Published and it will appear on the DX. In the event that there is a concern or issue, the status will be set to Partner Review and you will have to make the changes outlined in the review sections on the asset submission form and resubmit for review.

Editing Your Asset

You can update your asset at any moment in time. If you decide to change anything related to your Digital Exchange Profile or Submitted Asset/Solution, the system will automatically put your profile/asset in a status of ‘pending.’ An alert will be sent to the Marketplace Management Team that the changed item is Pending Versioning approval and requires review. When reviews are complete, then the Marketplace Manager will publish out the changes you have made. The old versions will remain published on Digital Exchange until the changes are approved by the Marketplace Management team.

